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ABSTRACT

Instructional projects are balanced when the pieces come together at one time with the concurrent approval of all interested parties. The physical analogy of a tripod can serve to illustrate the interaction among three dimensions of all projects: content, or what the course will contain; form, or what the course will look like; and process, or how the course will be built. Content starts with a broad statement of training goals, and instructional objectives and course design narrow the focus of what will be presented to the students. Subsequent steps include the selection of examples, detailed course outlines, first drafts, content review, and editing. Form starts with a description of media alternatives available to the project. The media capabilities influence the instructional objectives. Decisions on screen design, page layout, writing standards, and editorial content affect development. Process starts with the assignment of responsibility to individuals with the skills and authority to manage the project. Workflow is influenced by content and form requirements. Tracking systems, templates, shells, and change control ensure the balanced interaction among all three dimensions. Each leg of the tripod represents one of the dimensions that must be balanced with the others in a successful project. The slope of each leg illustrates the rate of decisionmaking for each factor, and depends upon the number of decisionmakers, the frequency of work sessions, and the individual and collective experience in working with the selected media. A project is balanced when all decisions interact smoothly. This document consists of: (1) a description of the elements of a balanced project model; and (2) a number of charts and diagrams suitable for overhead transparencies that illustrate the value of the model in planning and managing successful projects. (Author/EW)

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FACTORS IN A BALANCED PROJECT

by

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FACTORS IN A BALANCED PROJECT

Diana Pickens - Courseware, Inc.

Instructional projects are balanced when the pieces come together at one time with the concurrent approval of all interested parties. A physical analogy of a tripod is presented to illustrate the interaction among three dimensions of all projects: content, form and process.

- What will the course contain?
- What will the course look like?
- How will the course be built?

Content starts with a broad statement of the training goals. Instructional objectives and course design narrow the focus of what will be presented to students. Subsequent steps include selection of examples, detailed content outlines, first drafts, content review and editing.

Form starts with a description of the media alternatives available to the project. The media capabilities influence the instructional objectives. Decisions on screen design, page layouts, writing standards and editorial content affect development.

Process starts with the assignment of responsibility to individuals with the skills and authority to manage the project. Workflow is influenced by form and content requirements. Tracking systems, templates, shells and change control mechanisms ensure the balanced interaction among all three dimensions.

Each leg of the tripod represents one of the dimensions that must be balanced with the other in a successful project. The slope of each leg illustrates the rate of decision-making for each factor. The slope depends on the number of decision-makers, the frequency of work sessions and the individual and collective experience in working with the selected media.

A project is balanced when all decisions interact smoothly. Examples will illustrate the value of this model in planning and managing successful projects.

BALANCED PROJECTS

HAVE:

- **A plan that includes all major steps**
- **A process of setting and meeting expectations**
- **Clearly measurable milestones**
- **Good feelings at the end**

UNBALANCED PROJECTS

HAVE:

- **Episodes of wild flurry to catch up**
- **Missed expectations**
- **High levels of revision**
- **Ill will at the end**

DIMENSIONS OF PROJECT MANAGEMENT

- Content
- Form
- Process

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Telecommunications

CONTENT

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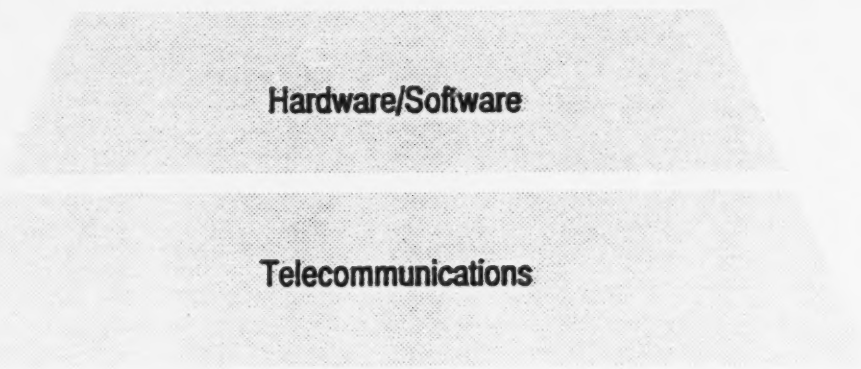

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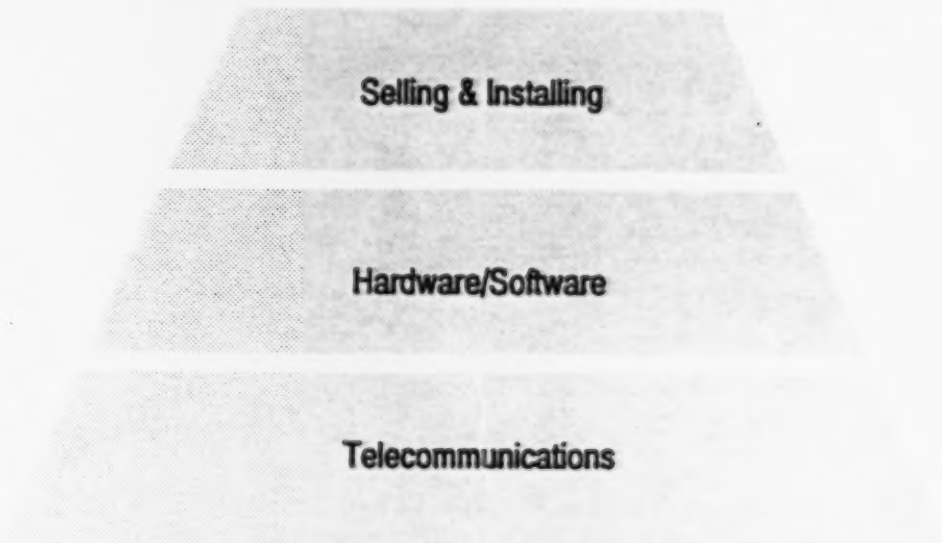

CONTENT

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CONTENT

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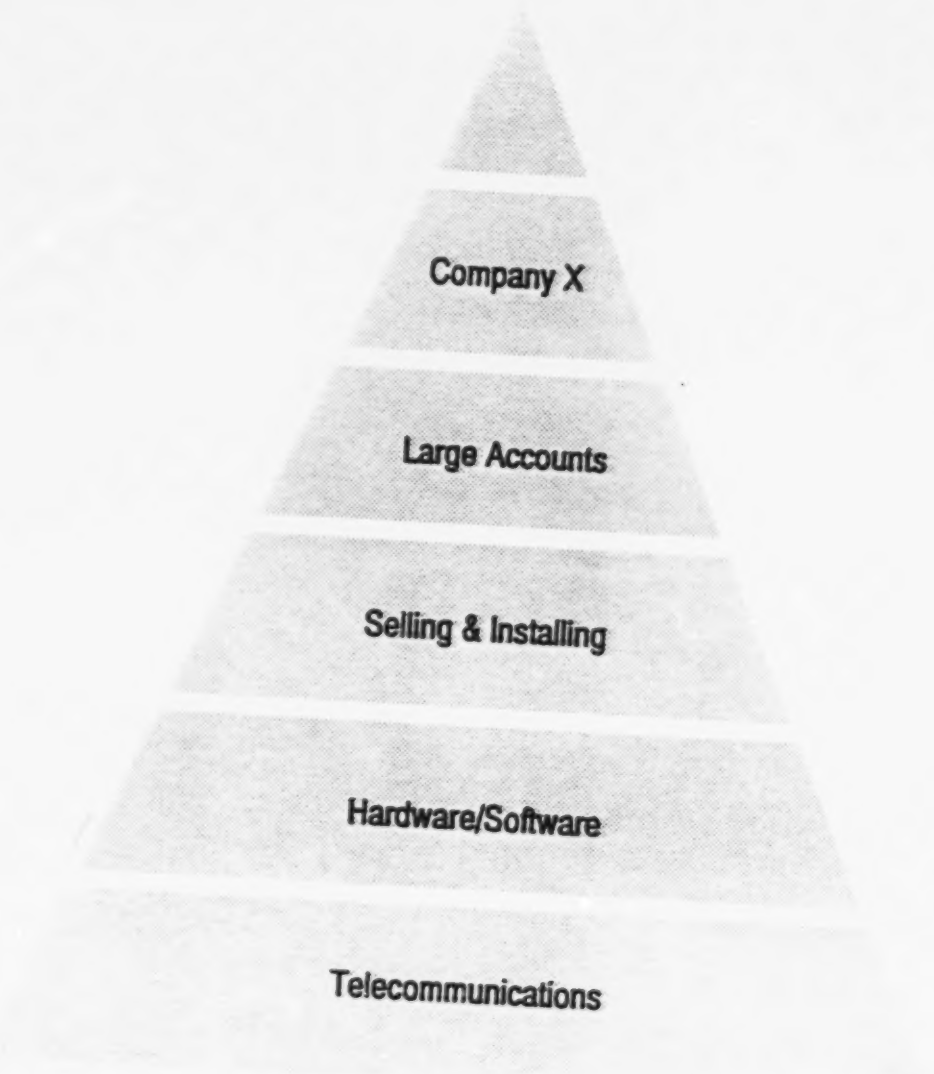

CONTENT

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DECISION MAKING vs TIME

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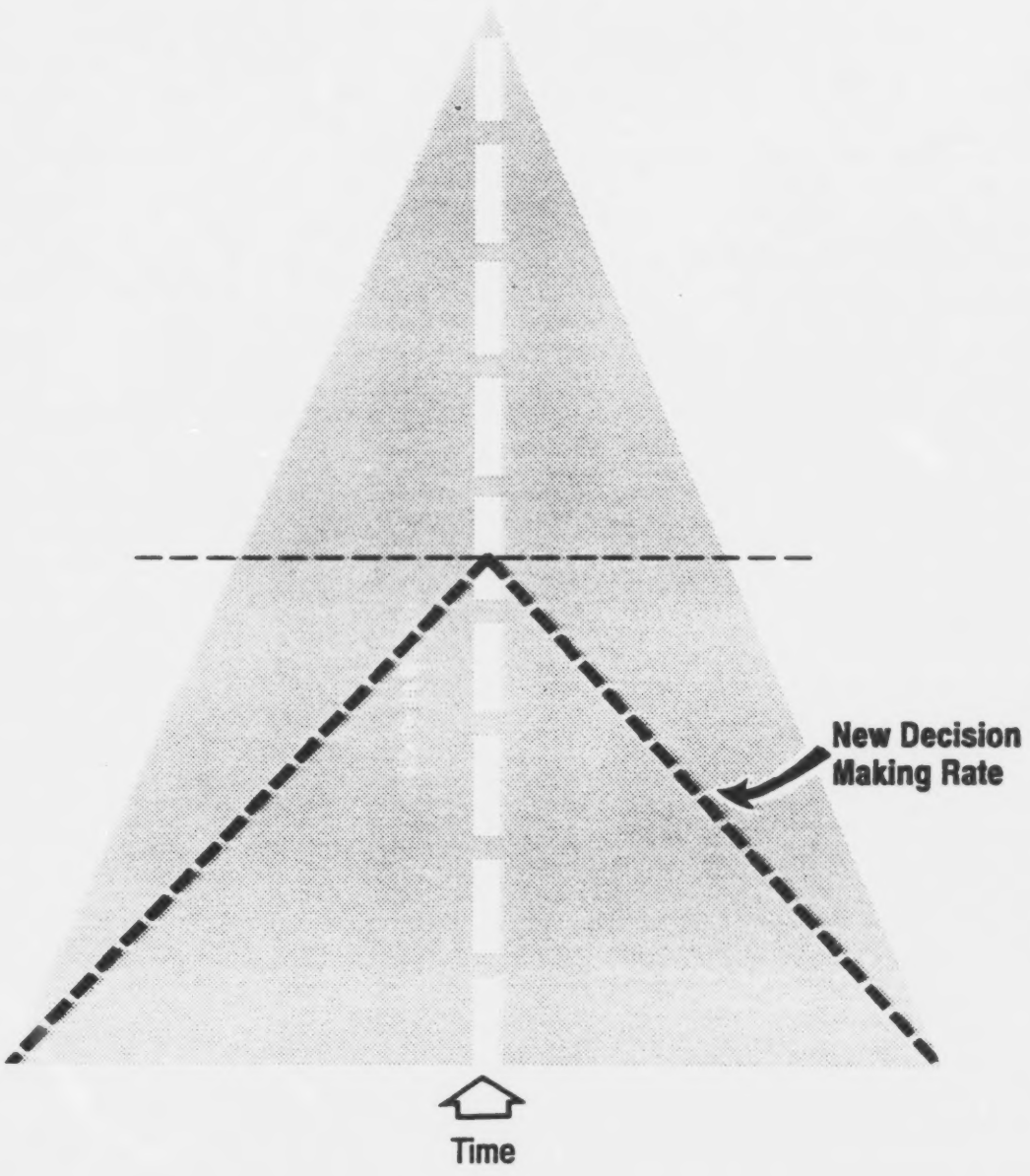

RATE OF DECISION MAKING PROPORTIONAL TO AVAILABLE TIME & NUMBER OF DECISIONS

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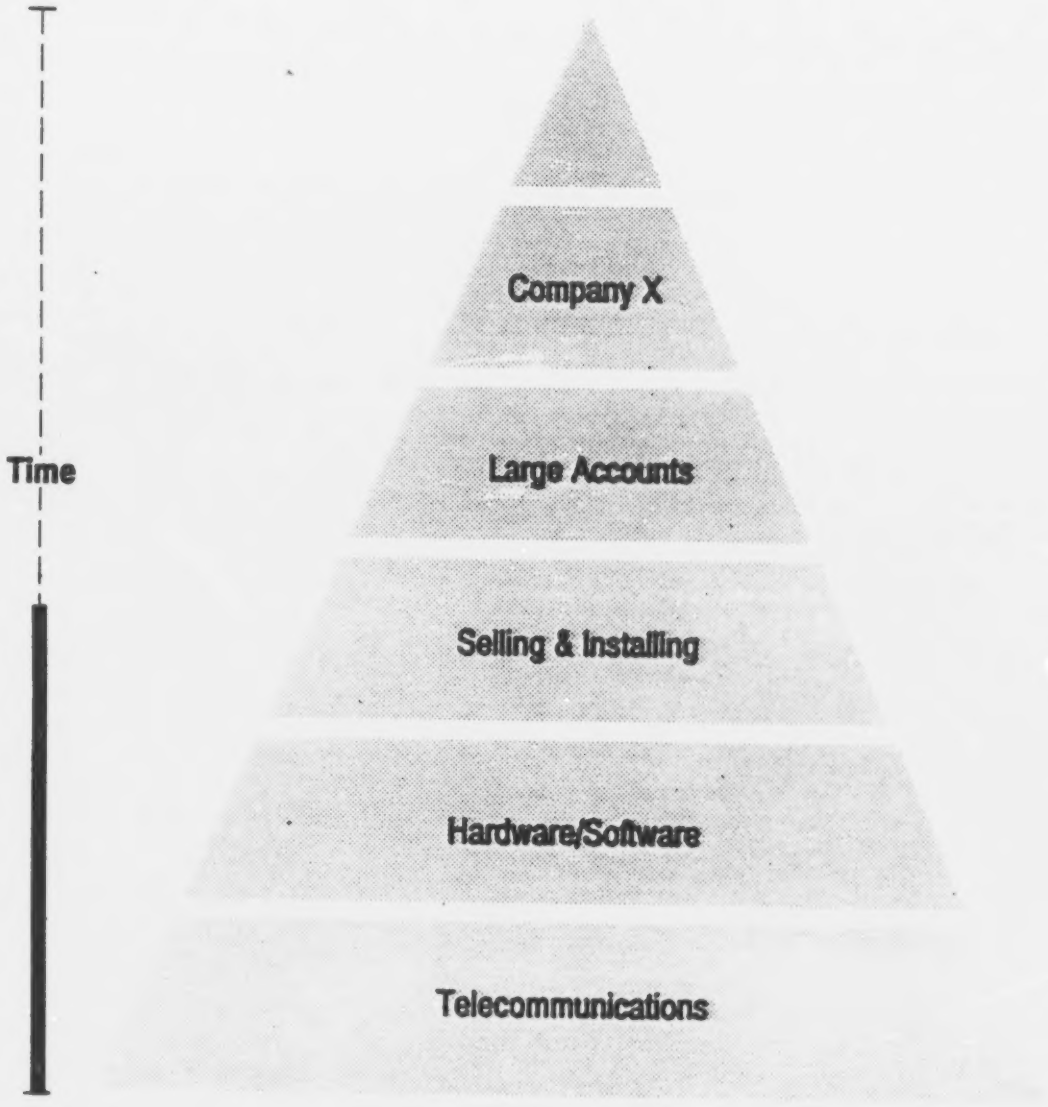

WHAT IF THERE IS A CHANGE IN A MAJOR ASSUMPTION

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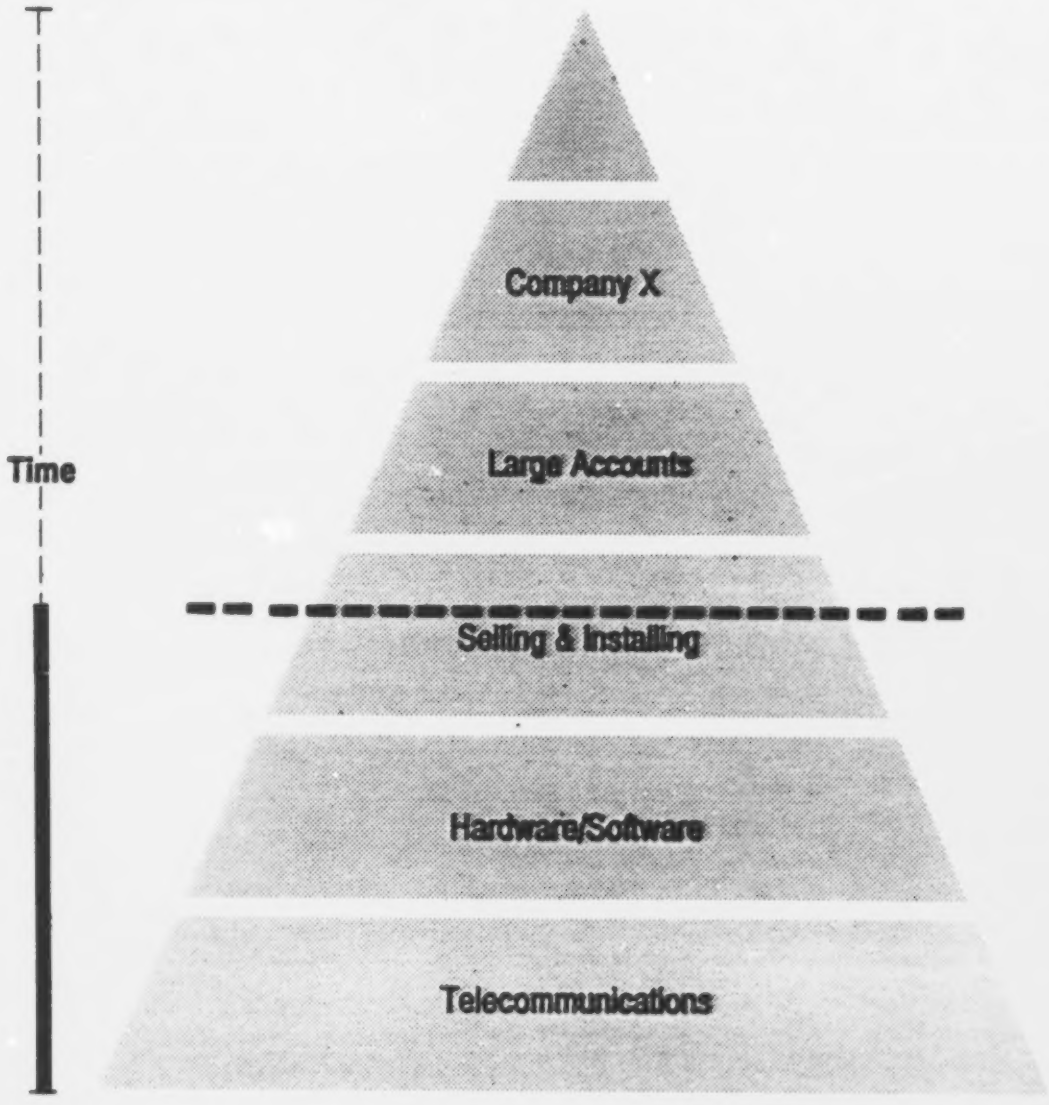

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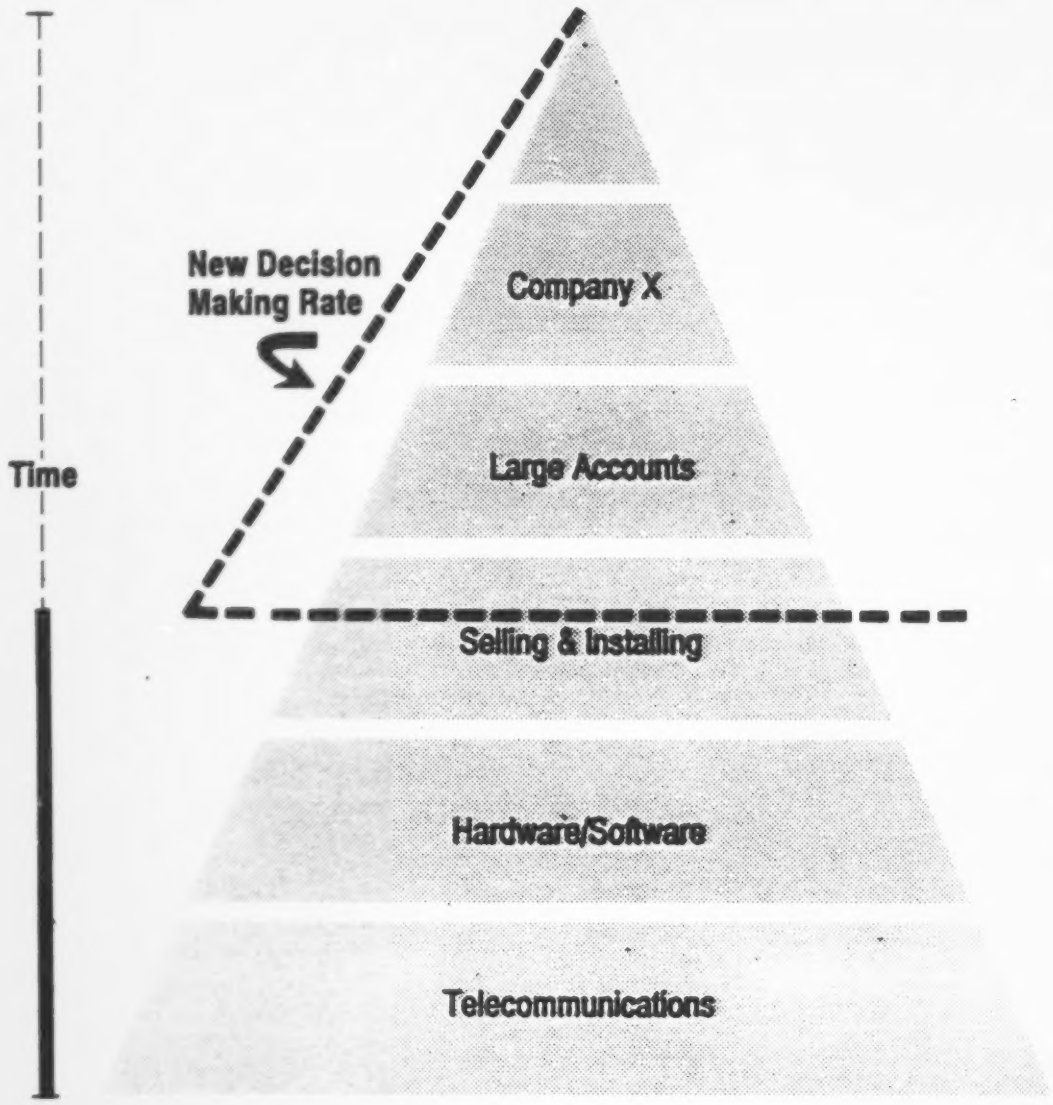

WHAT IF THERE IS A CHANGE IN A MAJOR ASSUMPTION

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DECISION MAKING RATE

Dependent on:

- **Number of decision makers**
- **Frequency of face-to-face meetings**
- **Experience with content**
- **Experience with team members**

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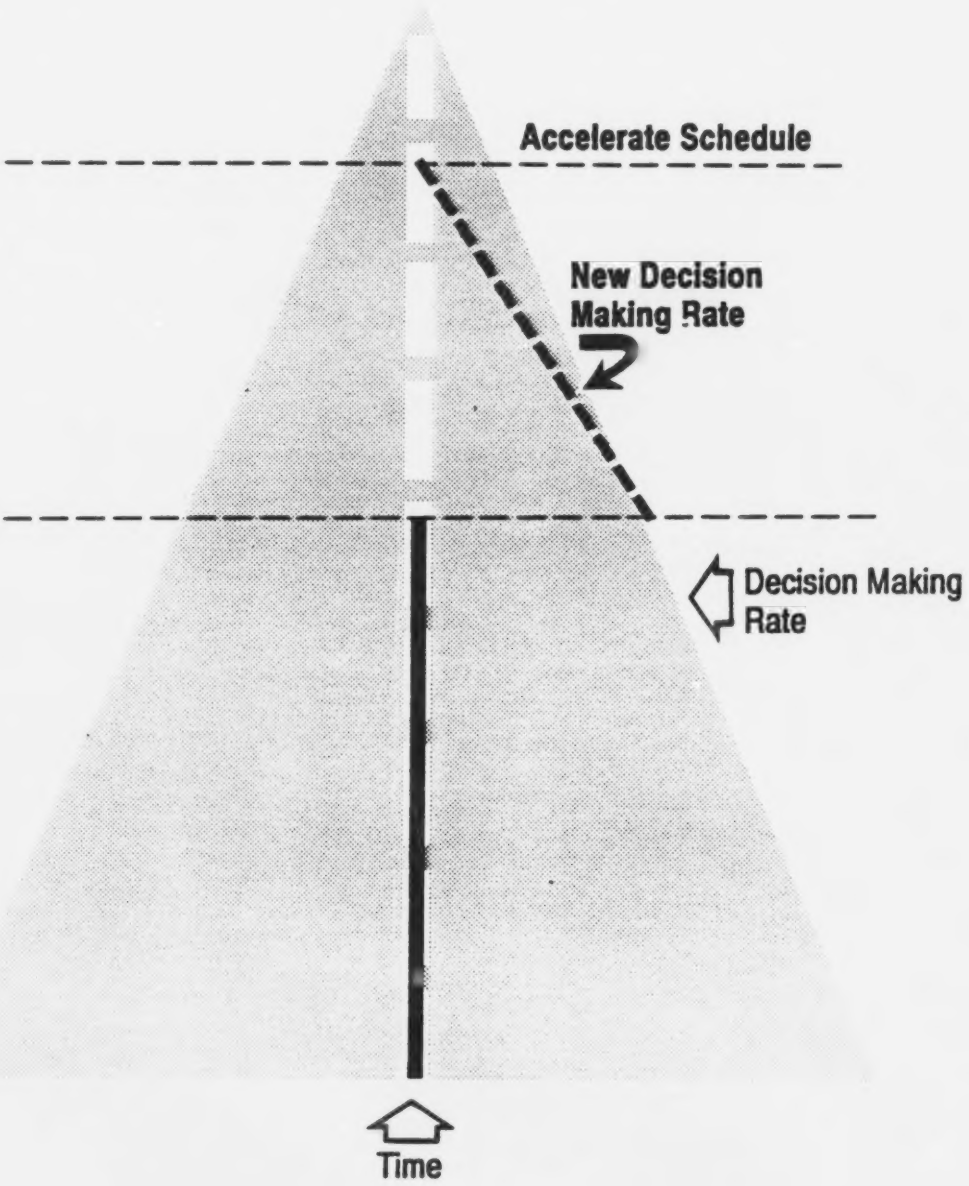

"CAN YOU ACCELERATE THE SCHEDULE"

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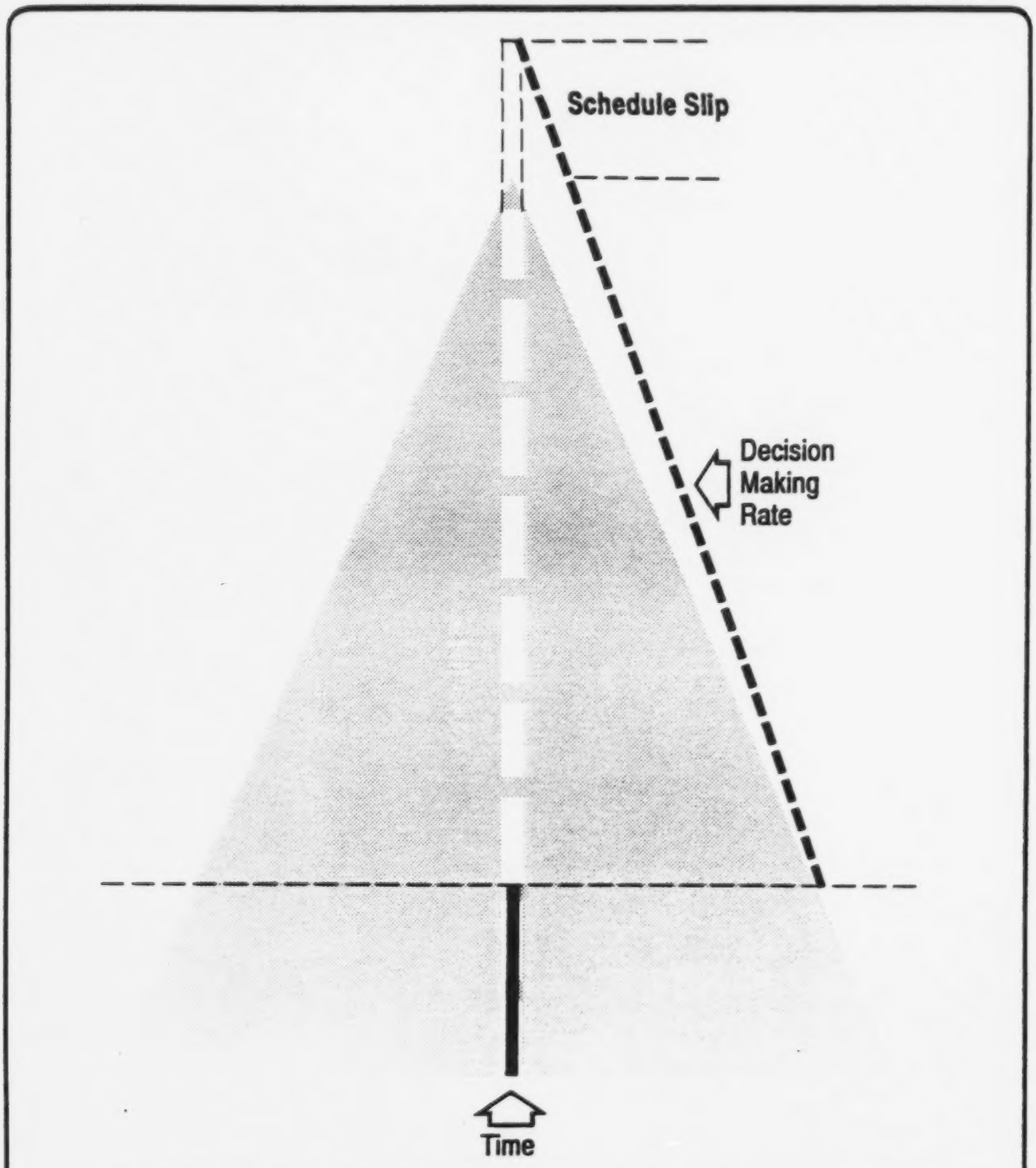

NEW DECISION MAKER ADDED TO PROJECT

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DIMENSIONS OF PROJECT MANAGEMENT

- ✓ Content
- • Form
- • Process

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Self-Study

FORM

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Computer-Based

Self-Study

FORM

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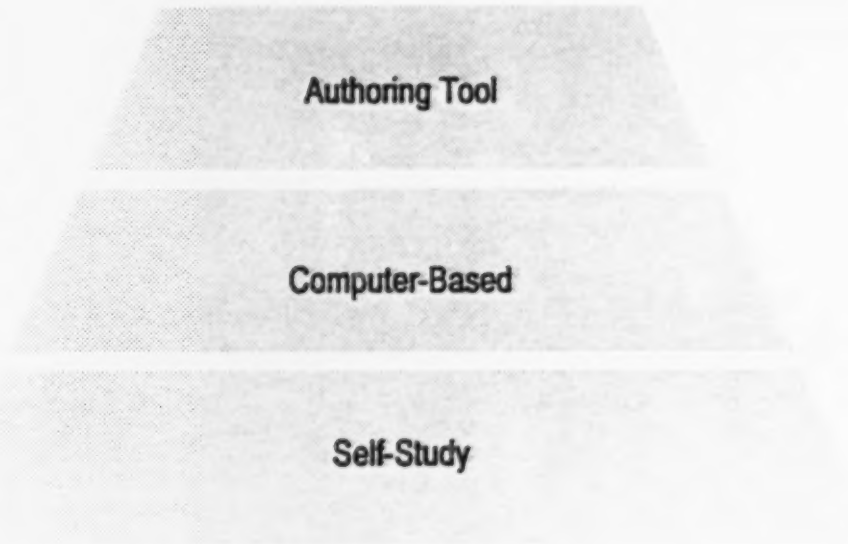

FORM

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FORM

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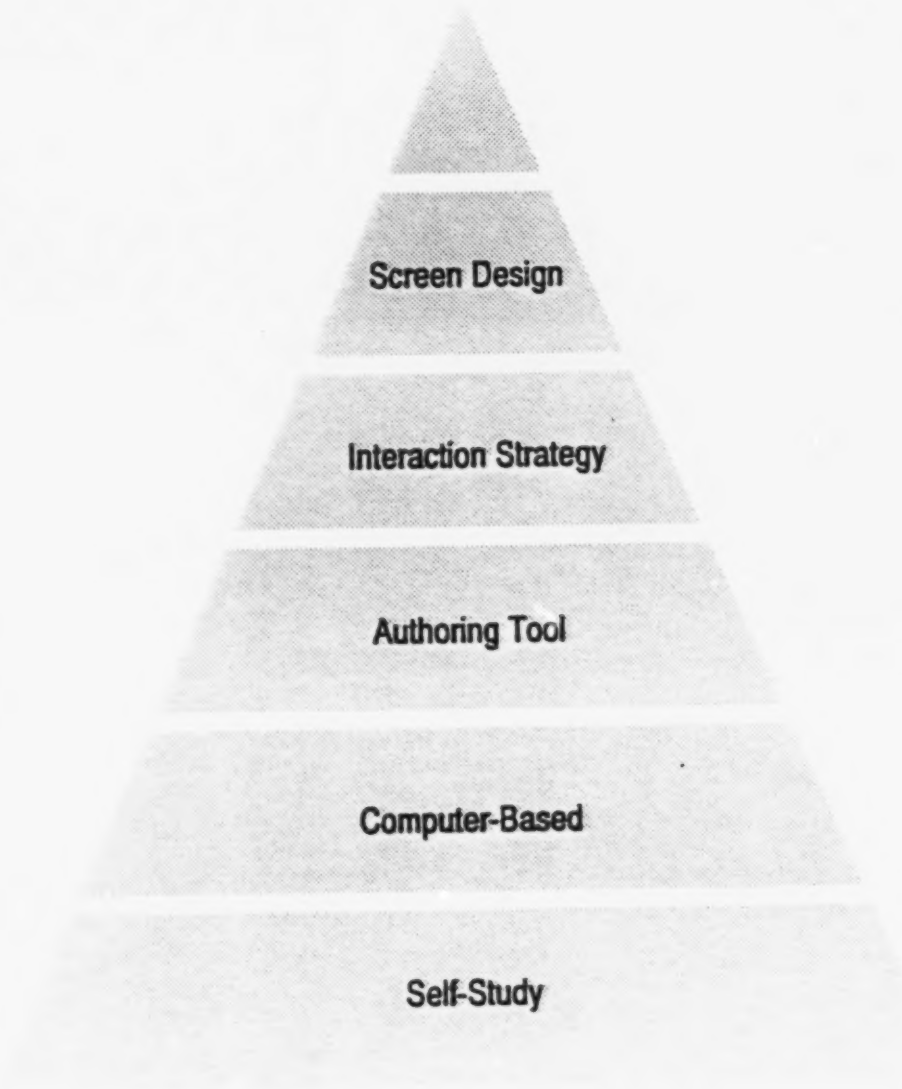

FORM

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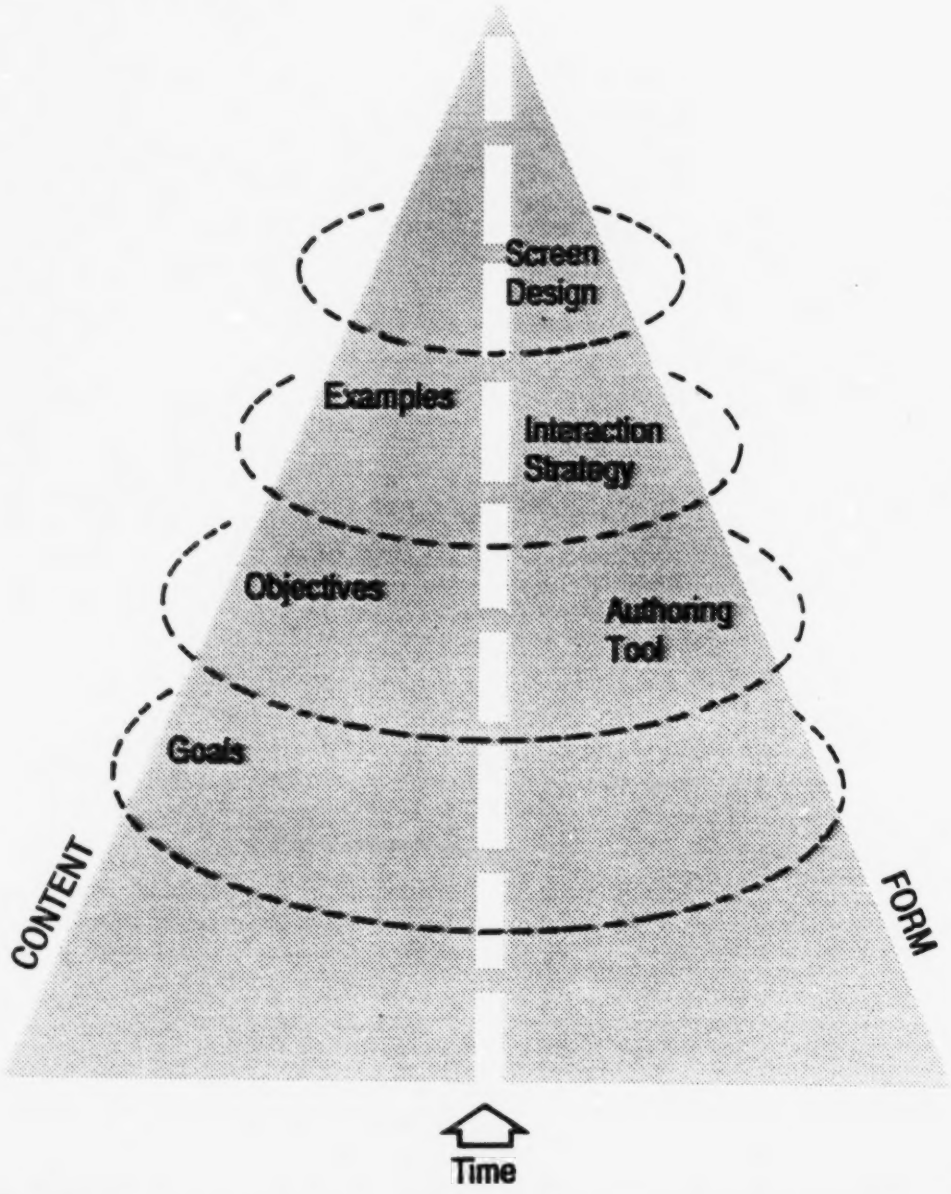

INTERACTION BETWEEN FORM AND CONTENT

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DIMENSIONS OF PROJECT MANAGEMENT

- ✓ Content
- ✓ Form
- • Process

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Owners

PROCESS

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Workflow

Owners

PROCESS

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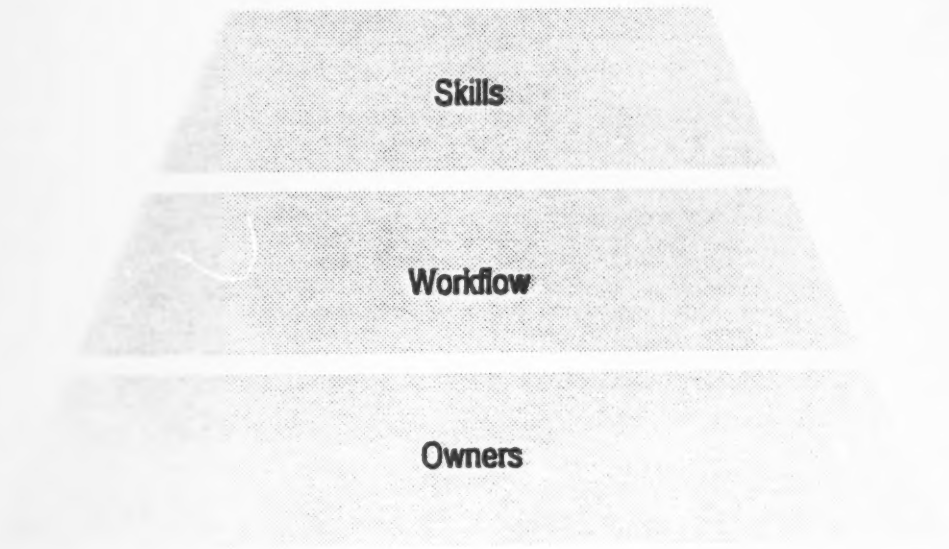

PROCESS

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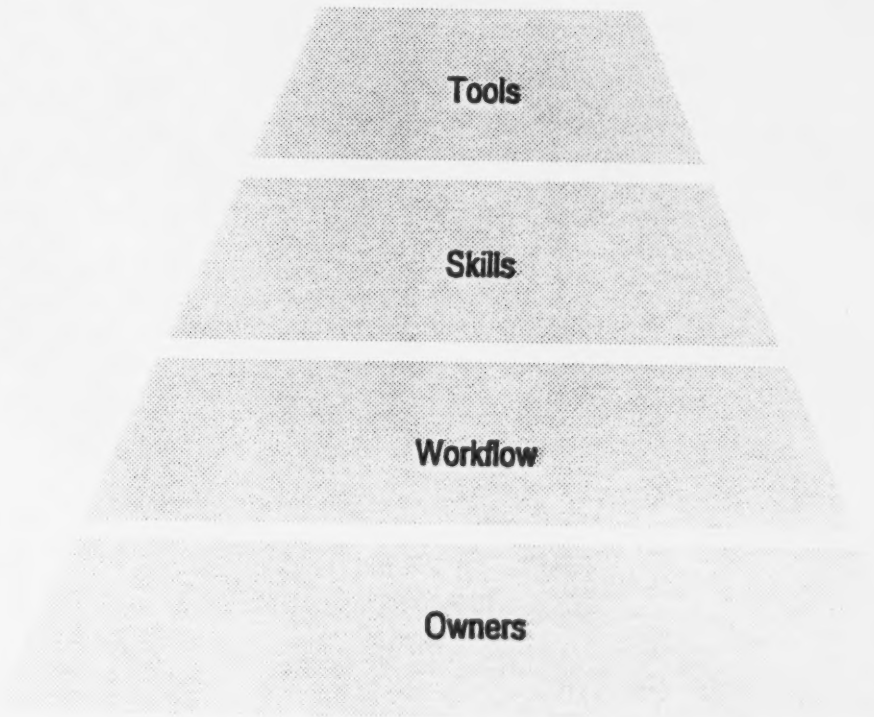

PROCESS

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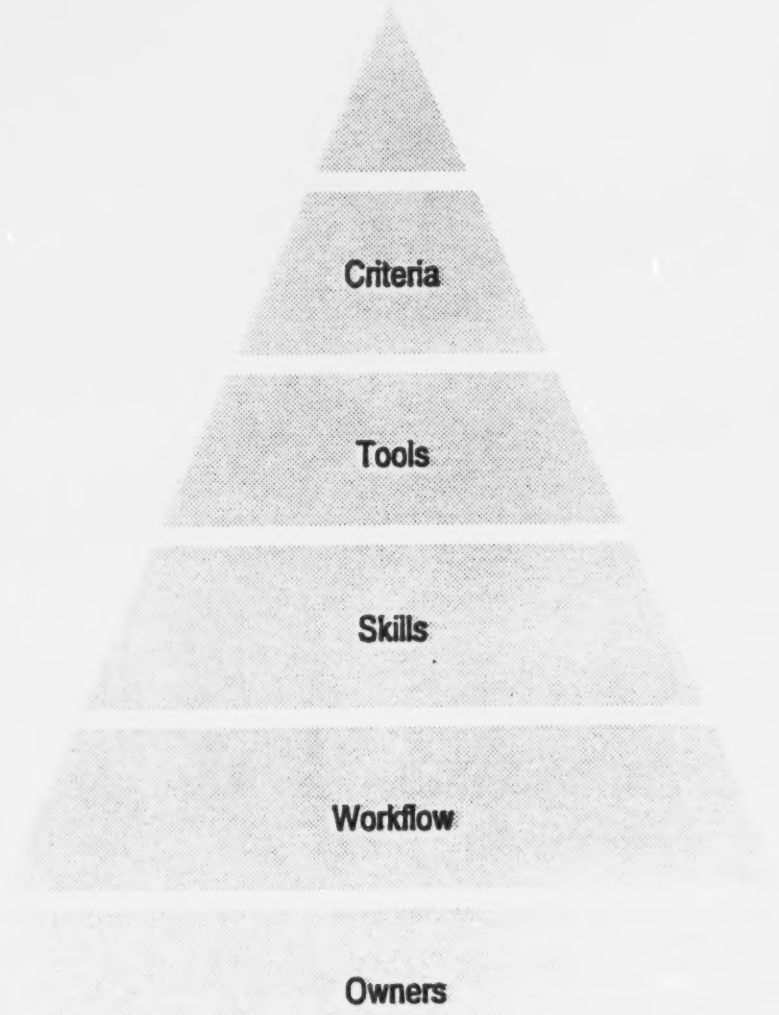

PROCESS

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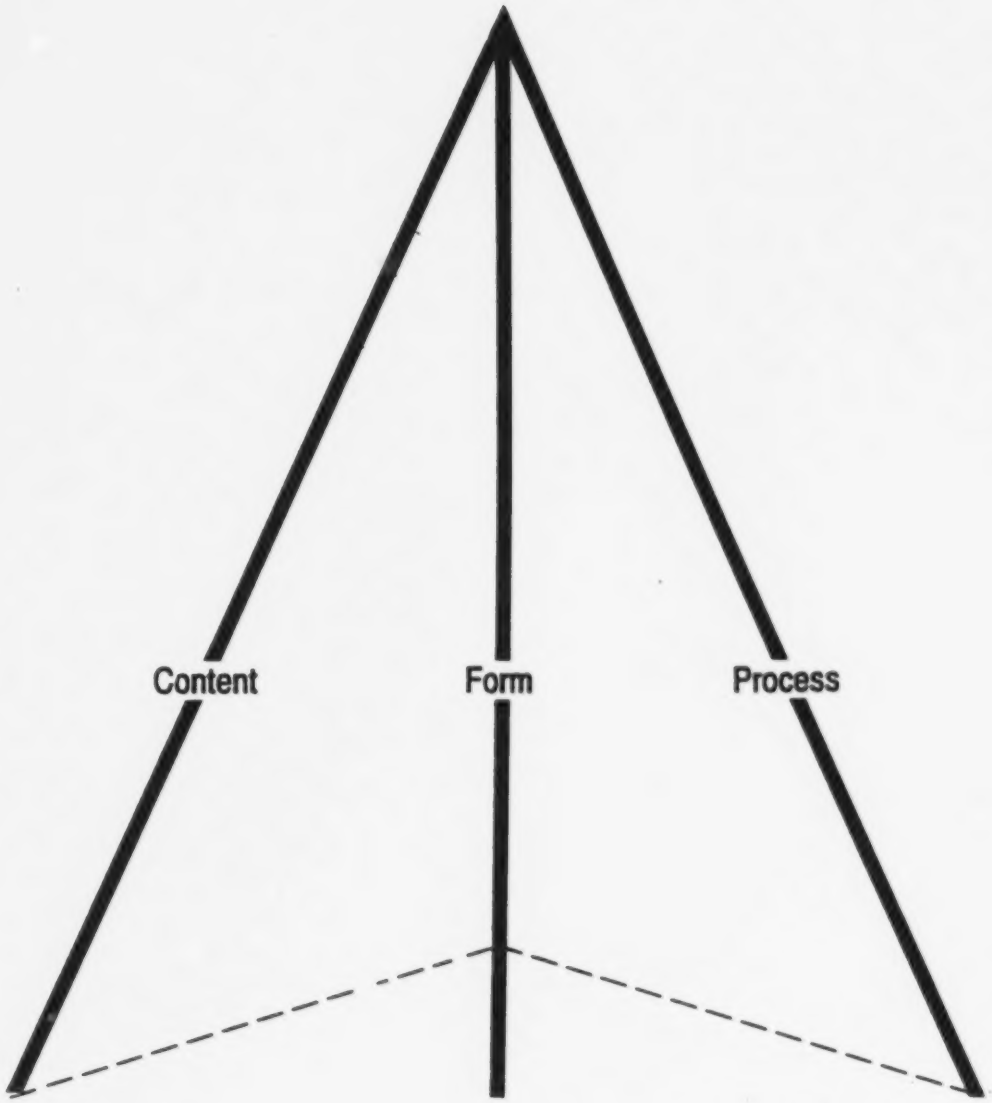

BALANCED PROJECT

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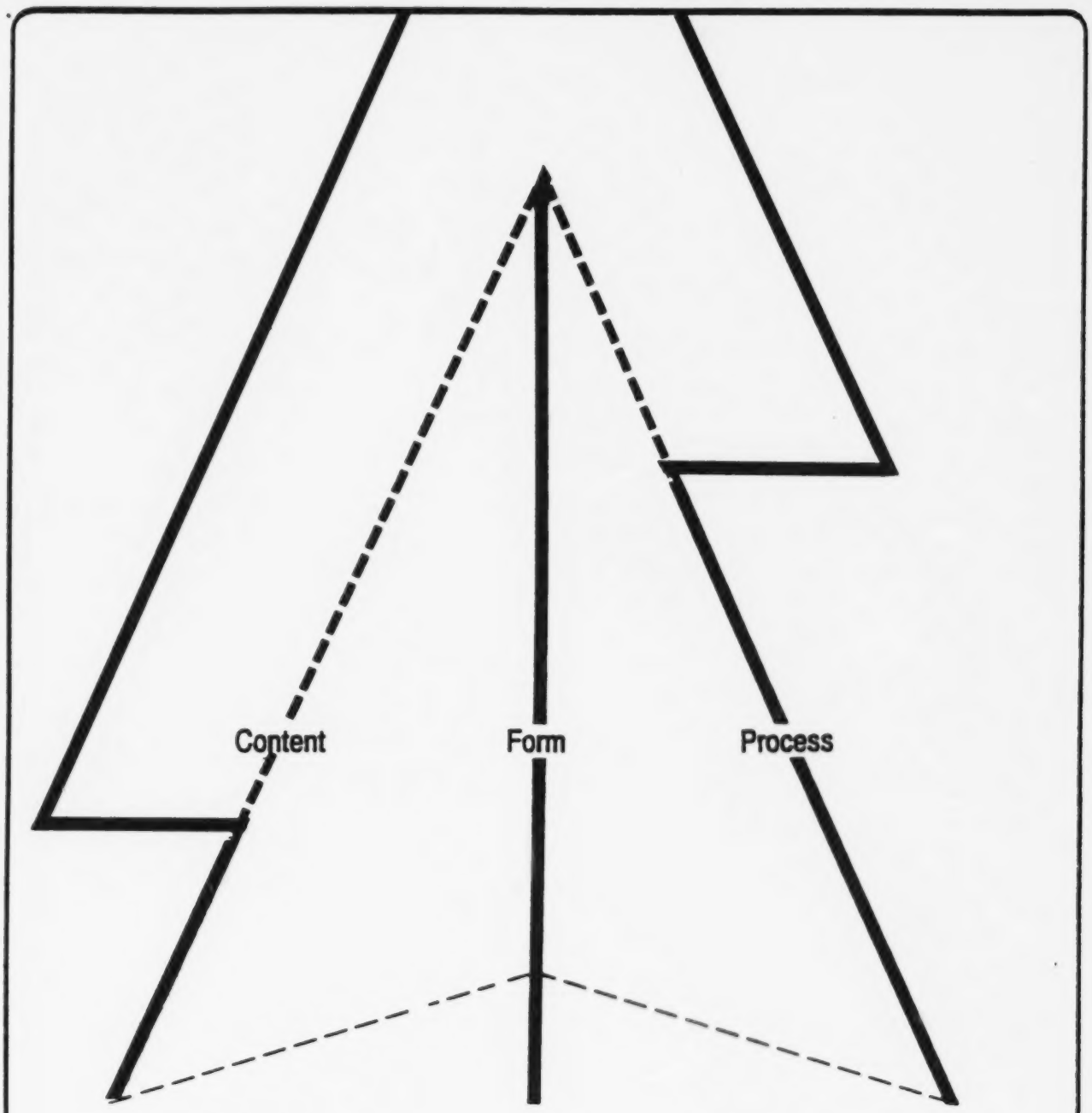

UNBALANCED PROJECT

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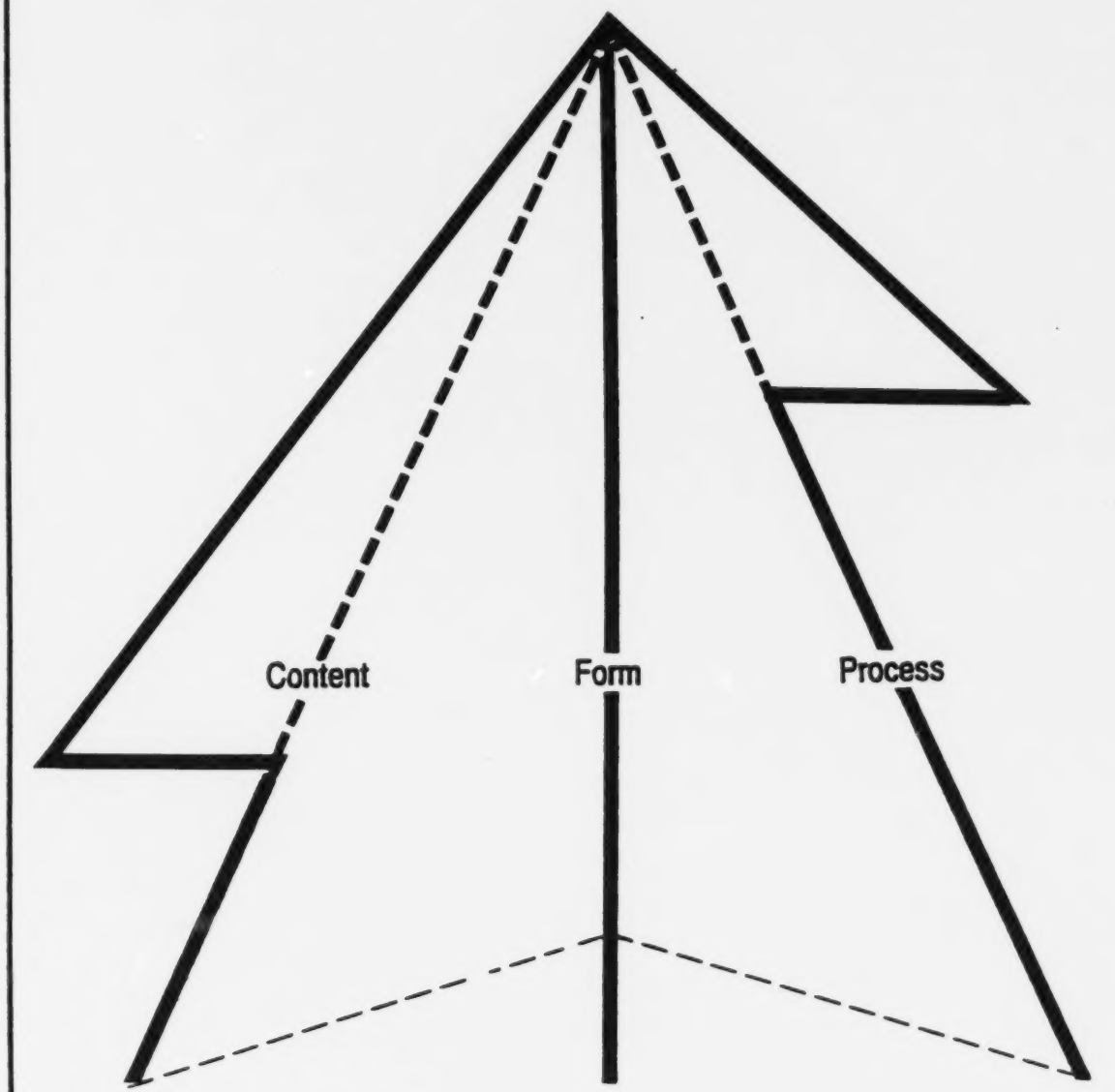

BALANCED BUT WOBBLY

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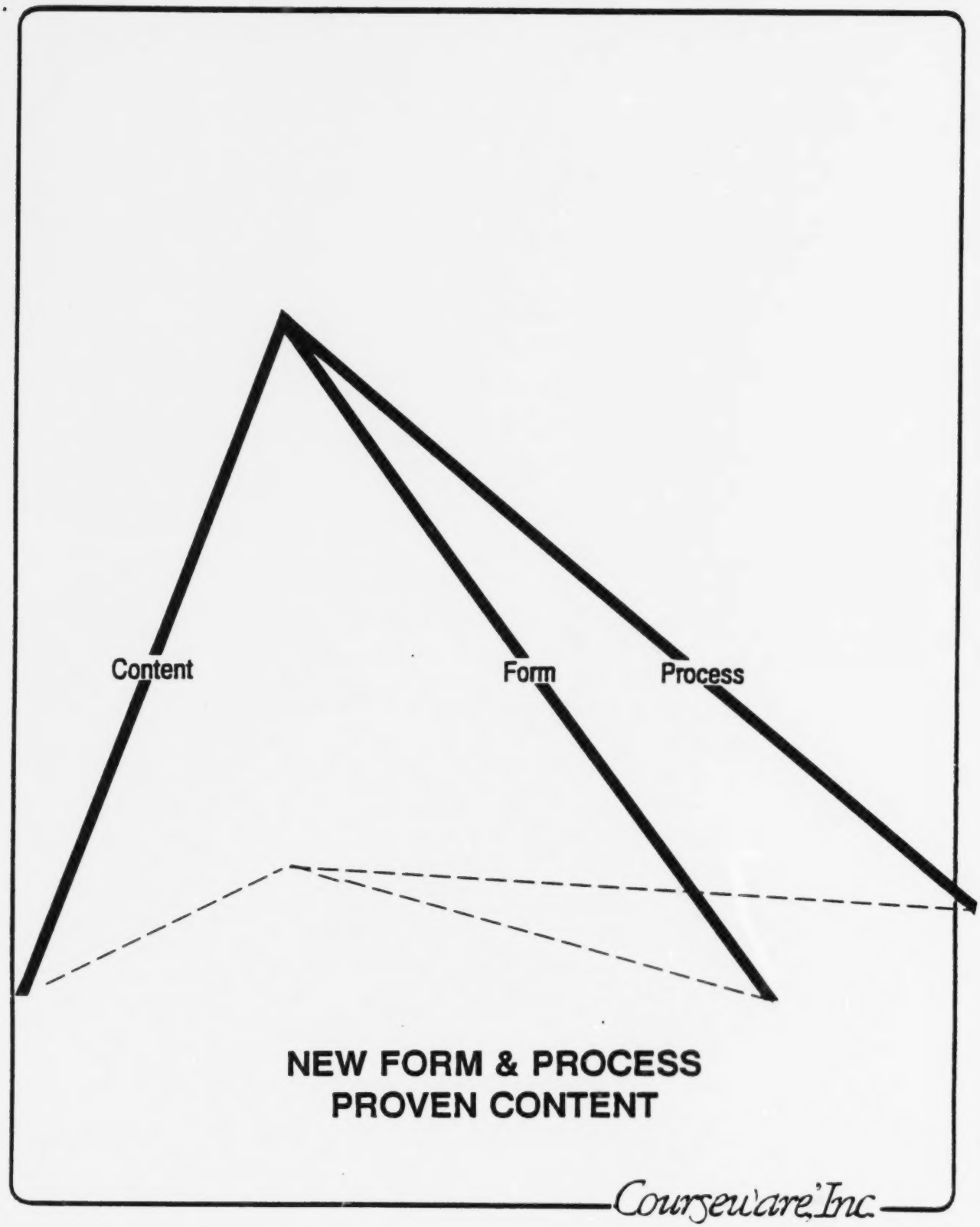
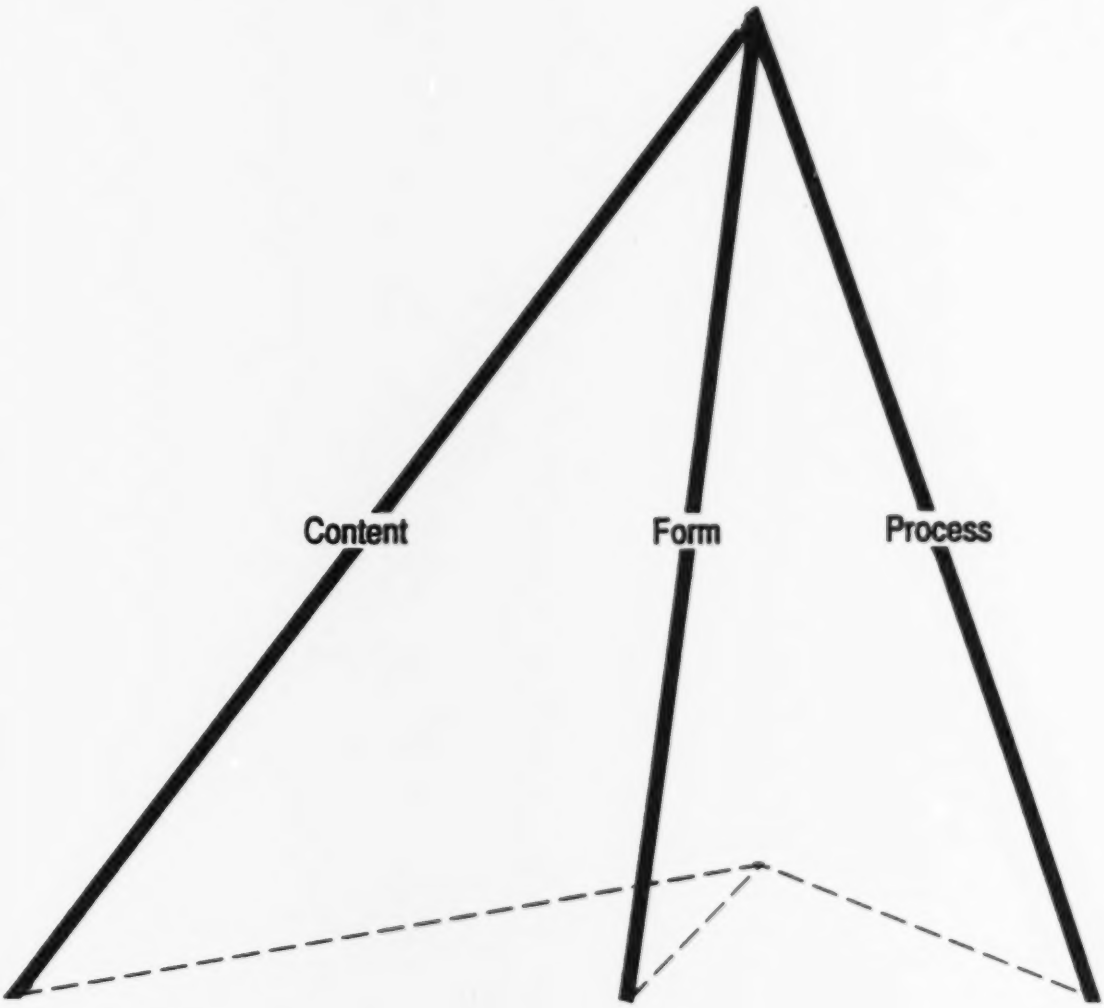

Content
Form
Process
NEW FORM & PROCESS
PROVEN CONTENT
Courseware Inc.



NEW CONTENT
PROVEN FORM & PROCESS

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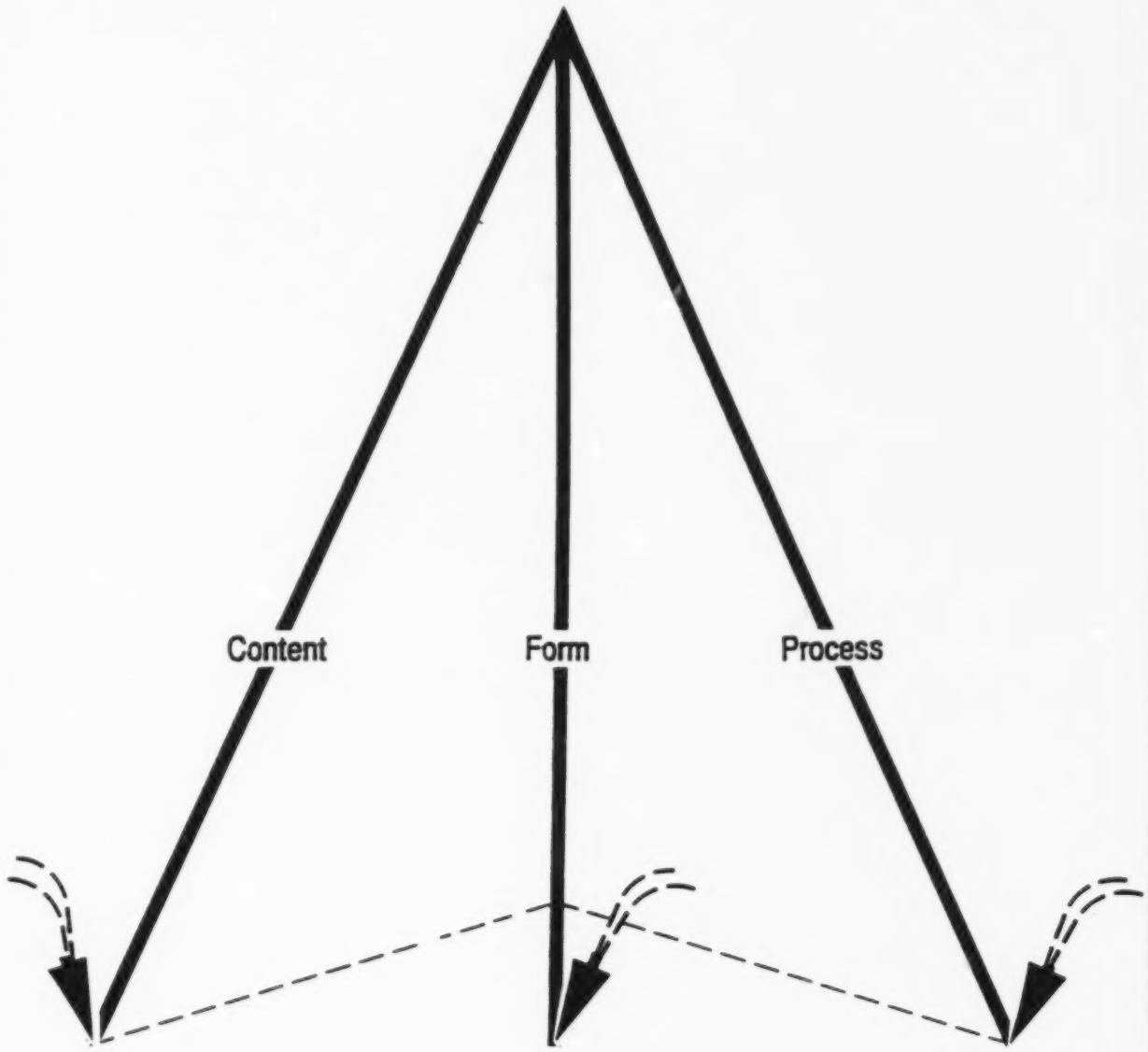

"STAKE IN THE GROUND"
"CAST IN CONCRETE"

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HOW TO ENSURE A BALANCED PROJECT

- Set expectations
- Document assumptions
- Monitor decision making rate
- Change rate to react to changes in assumptions

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DECISION MAKING RATE

Dependent on:

- **Number of decision makers**
- **Frequency of face-to-face meetings**
- **Experience with content**
- **Experience with team members**

NUMBER OF DECISION MAKERS

- Identify the final "owner" of the product
- Segment decision making responsibilities
  - Content accuracy
  - Readability
  - "Look and feel"
- Control expectations
  - Early prototypes
  - Review checklists
  - Change control processes

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FREQUENCY OF FACE-TO-FACE MEETINGS

- Set schedule at kickoff
- Easier to cancel than set new ones
- Substitute with conference calls
- Daily phone contact

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EXPERIENCE WITH MEDIA OR PROCESS

- Set expectations using comparable products
  - Samples of finished products
  - Samples of interim products
- Early training session to simulate process

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EXPERIENCE WITH CONTENT

- Contact with true subject matter expert
- Control explosion rate—no more than 10:1 ratio
  - 1/2 page per objective design
  - 5-page detailed design
  - 50-page storyboard
  - 50-frame online segment

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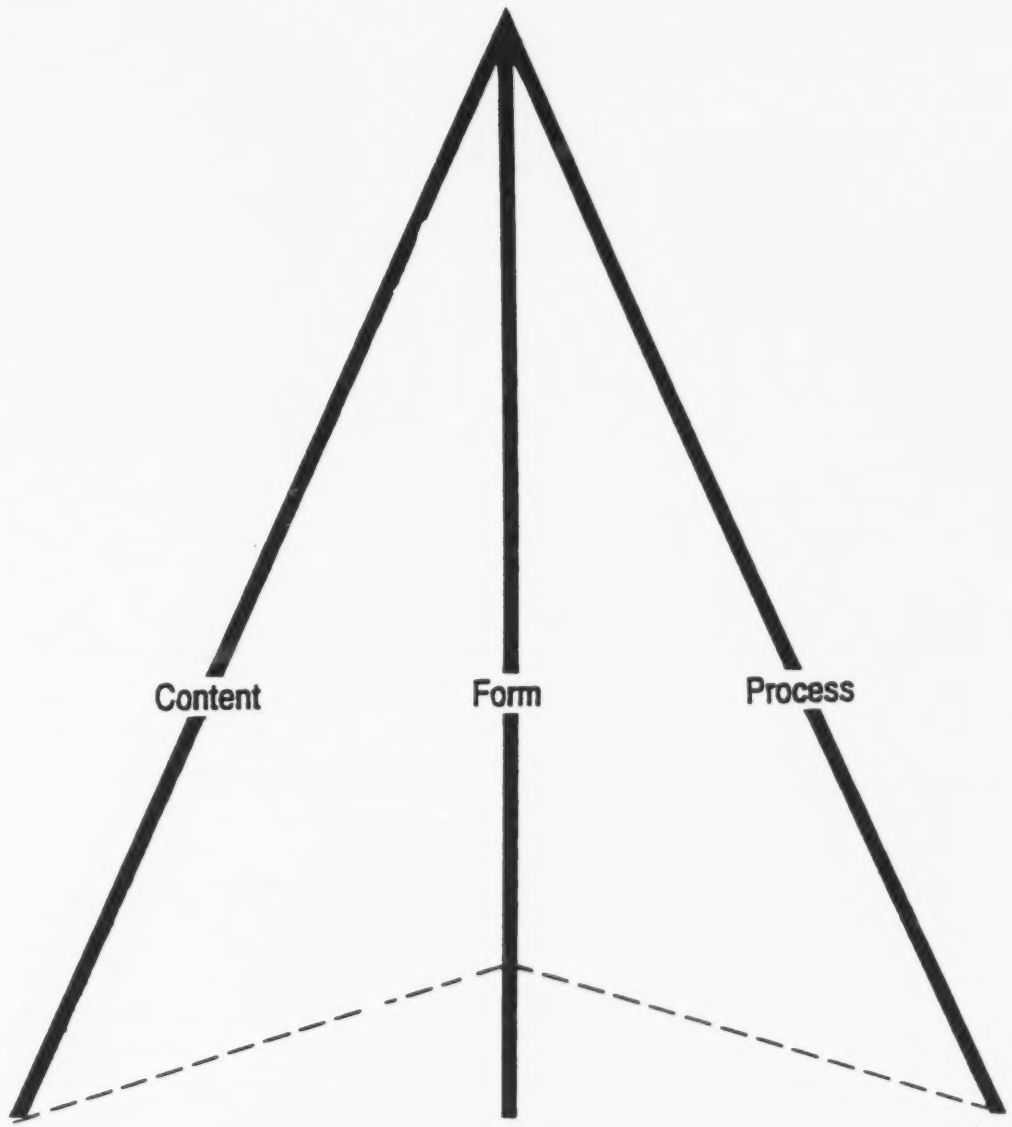

BALANCED PROJECT

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